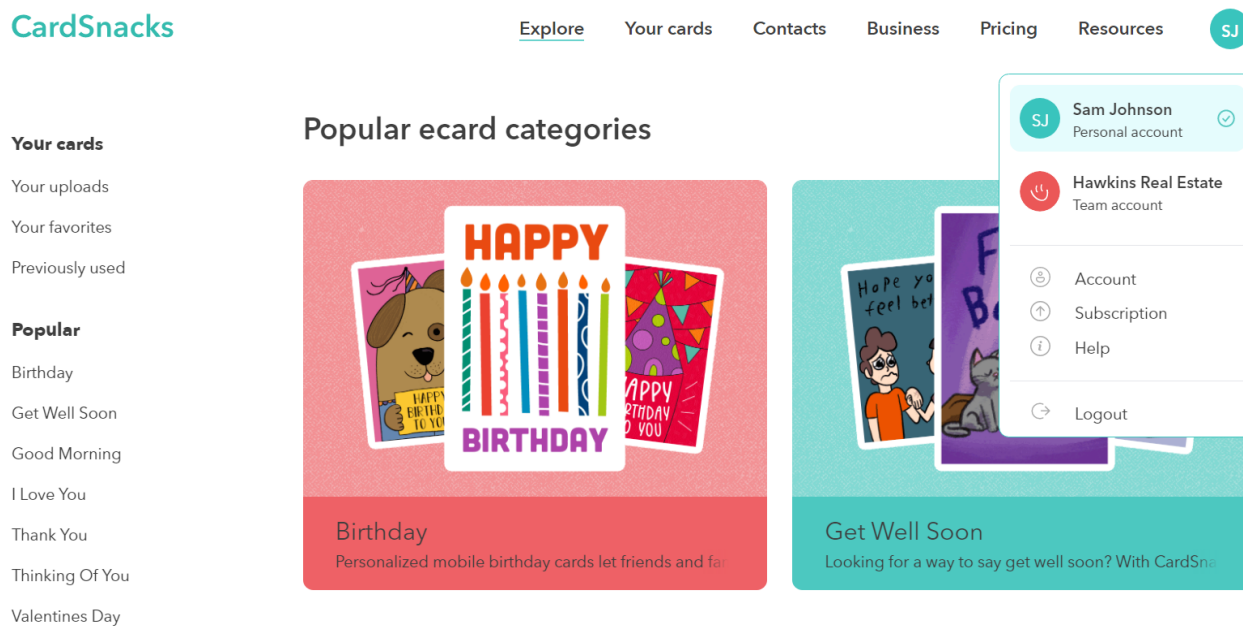


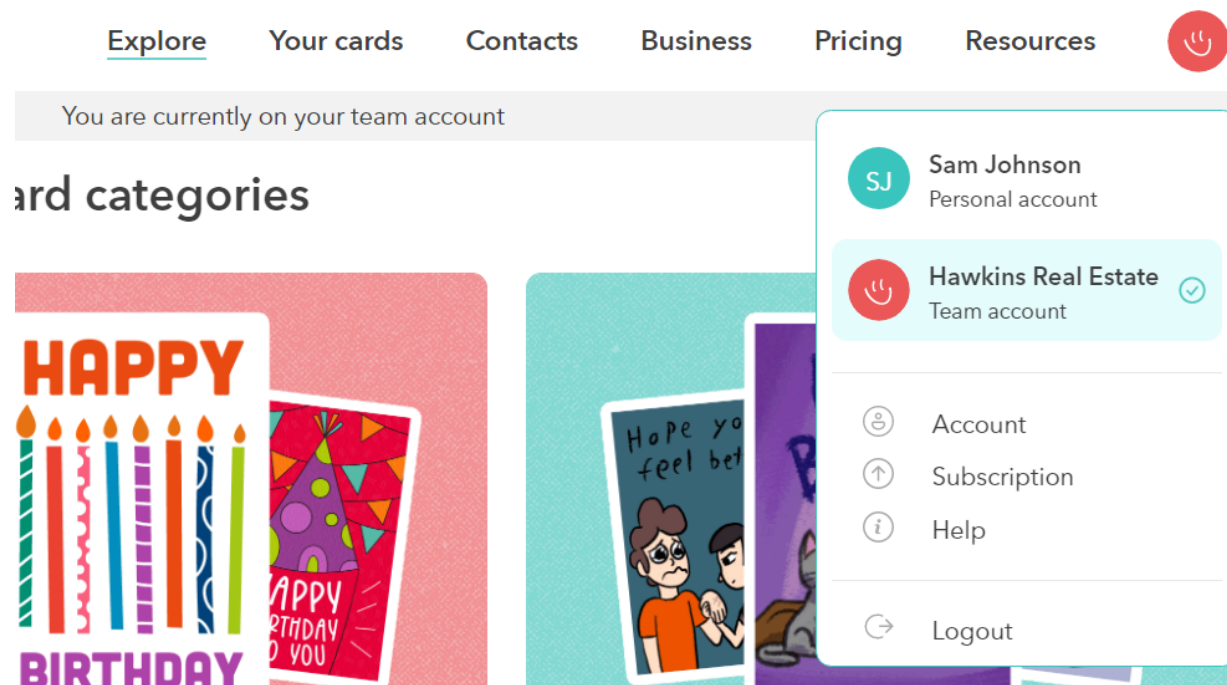
CardSnacks

How to Create
a Budget for a
Team Member


1 Go to cardsnacks.com. Click on your account icon in the top right corner, then click on your Team account. (If you don't already have a Team account, [click here](#) to learn how to create one).





2 After switching to your Team account, click "Account".





3 Click on "Team balance".

 Personal details

 Team details

 Team members

 Team balance

 Team plan

Account details

First Name
Sam

Last Name
Johnson

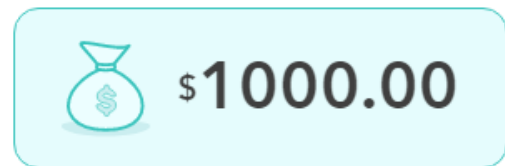
Phone number
+14045550001

Email
samjohnson@hawkins.com

[Update changes](#)


4 Ensure you have money in your Account balance. To learn how to add team funds, [click here](#).


Account balance





Allow team members to use team funds 


5 Click on "Team members".

 Personal details


 Team details

 Team members

 Team balance

 Team plan

Account balance

Allow team members to use team funds 

Want to add money?
Please select how you'd like to add money:

Wire transfer / ACH	Credit card
Send money via wire transfer or	

6 Click on the three dots next to the Team member you want to give a budget. Then, click "Add funds".

You are currently on your team account

Team members

- Sam Johnson
OWNER
- Bob Smith
+14045550002

Change role to admin
Add funds
Remove member

7 Enter the amount you want to add to this person's budget. Then, click "Confirm".

Add funds to Bob's account

Bob's balance is currently \$0. How much money would you like to add to his account? (Max: \$1000)

Amount
\$ 50

**Bob's new balance will be \$50*

Cancel Confirm

6 The amount you added should appear under the member's name.

Team members

Invite members

Sam Johnson

OWNER

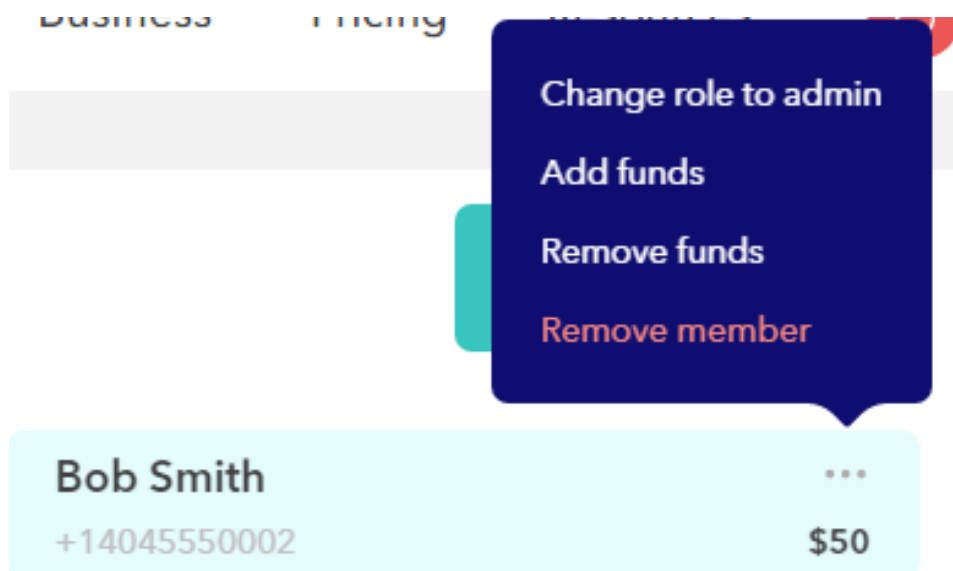
Bob Smith

+14045550002

...

\$50

7 If you want to remove the funds you added, click on the three dots next to the Team member's name. Then, click "Remove funds".



8 Enter the amount of money you want to remove. Then, click "Confirm".

Remove funds to Bob's account ✕

Bob's balance is currently \$50. How much money would you like to remove from his account? (Max: \$50)

**Bob's new balance will be \$0*